

Project Management

**Vendor Relations Session
January 19, 2005**

Today's Agenda

- **Welcome**
- **Review “*Policy for the Management of Technology Projects*”**
- **Review Proposed Vendor Reporting Requirements**
- **Review Vendor Training Program**
- **Vendor Comments and Feedback**
- **Next Steps**

PROJECT MANAGEMENT

Policy for the Management of
Technology Projects

State Policy Committee

- **Mike Garon, DOR**
- **Tom Olson, SDE**
- **David Foshee, DDSN**
- **Doug Harper and Ann Futch, DOT**
- **Steve Flowers, SAF**
- **Tom Brewer, USC**
- **Camille Brown, CHE**

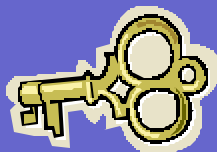
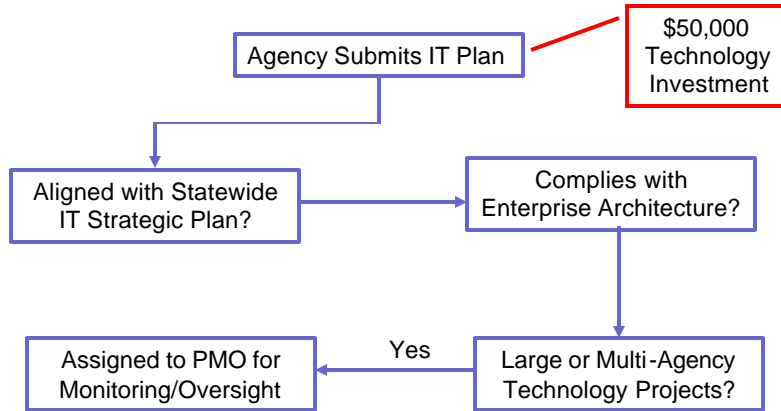
Purpose of State Policy

- Promote the importance/value of using sound project management practices
- Require agencies to adopt and utilize a project management methodology for all IT projects
- Define projects that should be monitored (due to size or complexity) through a shared relationship between the State PMO, agency and, when appropriate, the vendor
- Define the responsibilities of the State PMO, the agency and the vendor in managing State IT Projects

Definitions

- Project: a new or unique product or service or a major revision to an existing technology system (it is not ongoing operations).
- Cumulative Investment: “Hard” and “soft” dollars that will be incurred by an agency to implement a project from initiation to closure.

Enforcement - IT Planning Process



Policy

Major and Multi-Agency/Enterprise Technology Projects are subject to additional review by the State PMO.

Four Categories of Projects

- Minor Projects (less than \$50,000)
- Small Projects
- Major Projects
- Multi-agency/Enterprise Projects

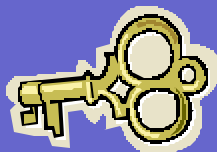
Each category has different administrative and management requirements.

Major Technology Projects

- Projects with a cumulative investment in technology of \$1 million or more
- For smaller agencies, projects that meet two or more of the following criteria:
 - Estimated IT investment exceeds \$400,000
 - Mission critical
 - Duration exceeds twenty-four months
 - High risk (leading edge technology)
 - Has enterprise/multi-agency implications

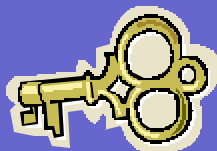
Multi-Agency/Enterprise Projects

- Multi-agency projects –a cluster or group of state agencies
 - South Carolina Business One Stop (SCBOS)
- Enterprise projects – all state agencies
 - South Carolina Enterprise Information System (SCEIS)



Policy

Exception: Large agencies can obtain certification to independently manage projects having a cumulative investment in technology up to \$5 million (criteria is being developed).



Policy

Beginning July 1, 2005, project managers assigned to Major and Multi-agency/Enterprise Projects must be “certified” under a program approved or provided by the State PMO.

Training Committee

- **Most of the Methodology Committee**
- **Jeff Farnham, USC**
- **Ken Sumner, DDSN**
- **Dan Sherrill and Todd Anderson, DOT**
- **Sandra English, DOR**

Training & Certification Program

- CIO to establish a Project Management Academy (share costs)
- Two levels of Certification – Associate and Senior
- Initial Senior Project Management session (6 days) completed in November
- Initial Associate Project Management session (15 weeks) to begin in February

Minor and Small IT Projects

Recommended Certifications

State Employees:

- Certified **Associate** State Project Manager
- PMP

Vendors:

- PMP (initially)
- Internal Project Management Certification Programs (future)
 - Aligned with PMBOK

Major and Multi-agency/Enterprise Projects

Required Certifications

State Employees:

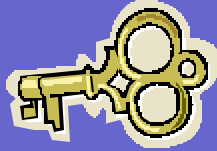
- Certified **Senior** State Project Manager
- PMP

Vendors:

- PMP (initially)
- Internal Project Management Certification Programs (future)
 - Aligned with PMBOK

Vendor Training

- Approximately Four Hours
- No Charge for Training
- Cover South Carolina specific requirements:
 - Reporting Requirements
 - Contract Provisions
 - Standard Methodology



Policy

The State PMO must develop a standard project management methodology by July 1, 2004. Each agency must adopt this or an approved methodology by July 1, 2005.

Methodology Committee

- **Barbara Bailey, DGS**
- **Earl Moore/Mike McKinney, Piedmont Tech**
- **Laurah Shealy, SCEL**
- **Rita Anderson, PMP USC**
- **William Wingard, CIO**
- **Doug Mader, PMP DOR**
- **Gloria Miles, DDSN**

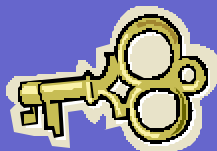
Project Management Methodology

- Initiation
- Planning
- Execution
- Control
- Close-Out

The State's Project Management Methodology is fully aligned with PMI's PMBOK.

Methodology

- Project Checklist - defines requirements for the four types of project in the State Policy
- Methodology – includes forms, templates, checklist and standard reports
- In test now
- Need agency and vendor feedback



Policy

The State PMO must establish a “dash board” reporting process for Major and Multi-agency/Enterprise Projects by July 1, 2005.

“Dashboard” Processes

- Only applies to Major, Multi-agency and Enterprise Projects
- Periodic (probably monthly) reports to be submitted to the State PMO
- Vendor must develop/provide reports in the format established by the State PMO
- Red, green and yellow status reporting
- State PMO will assign project a manager to assist/coordinate with agency/vendor project manager

“Smart Person” Type Contract

- Separate contract for project management services
- Administered by ITMO
- Contain specific provisions
- Rates for senior/certified project managers higher

Special Contract Provisions

- Sign that agree and will comply with State Policy
- Complete deliverables at the end of each project phase before going to next phase
- Honesty in Reporting
- Must use State Project Management Methodology unless another has been approved
- Must replace project manager on a project with someone having same skills/certifications

Project Management Web Site

www.cio.sc.gov